

Best Practices *for* *Virtual Engagement*



The COVID-19 pandemic is a stark reminder that, in good times and bad, it is vital for people to make connections, work together, share ideas, and resolve differences. This is equally true in engaging the public to shape our society's collective future.

Despite the current pandemic, we still need to work together toward implementing solutions, connecting leaders, and advancing policy to build thriving communities that integrate civic engagement with environmental, social and economic priorities.

Traditional community engagement and participation relies heavily on in-person, face-to-face, hands-on public meetings and activities to share concerns and reach solutions. While online experiences and technological tools have been added to the mix, we as a society have not fully mastered virtual engagement.

During a time when folks are staying home and avoiding public groups, we still need to continue public outreach and engagement. The virtual world must suffice for now.

The Local Government Commission is providing this summary of best practices, key considerations and specific guidance, with the hope of supporting our members and partners in creating effective virtual engagement during these unique circumstances – as well as in better times to come.

For more tools and resources on virtual engagement:
lgc.org/resource-library



Key Considerations

for effective virtual engagement

1 Embrace the Virtual World, Embrace Humanity

Resist the urge to simply convert an in-person event to a virtual one. It's almost apples and oranges; you will need to completely re-evaluate the engagement – the structure, interactions and results – as a whole.

What would you normally do in an in-person setting, and how can you provide a similar experience or value in the virtual environment?

- Flip charts and stickies vs. virtual white-board, comment box.
- Small-group discussions in physical space vs. virtual breakout rooms.
- Informal networking and talking with one another during breaks vs. providing prompts for individuals to connect one-on-one via chat:

“Find someone whom you don't know, and private-chat them one thing you hope to get out of the meeting.”

“Find someone whom you've only communicated with (via phone or email) but have never met in person, and private-chat them something fun you did over the weekend.”

“Find someone with the same first or last initial as you, and private-chat them your favorite aspect of your current job.”

Recognize fully both the limitations and advantages of virtual engagement; and leverage them to the greatest benefit.

People tend to get distracted, and will multi-task during virtual events. You will need to ignite participants' intrinsic motivation to keep them engaged.

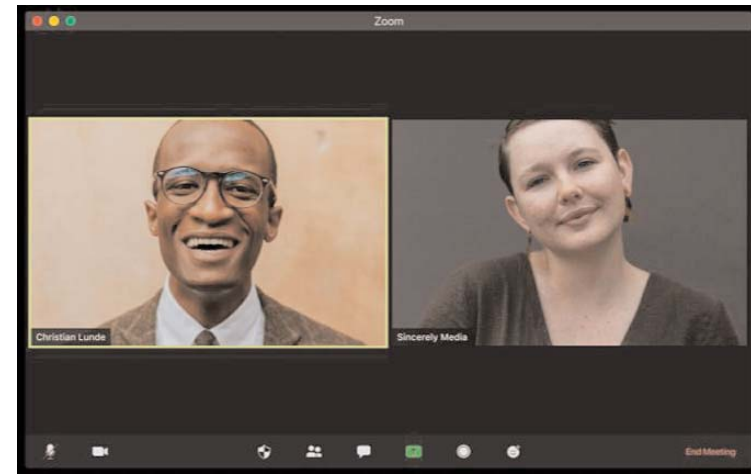
Humans have three overarching psychological needs that must be met to foster intrinsic motivation: autonomy, competence and relatedness.¹ Keep these elements in mind when developing your virtual engagement to maximize focus and participation:

- **Autonomy.** Give participants some control over their choices. This can be as simple as choosing to respond verbally or via chat box, selecting their personal background, choosing a breakout-group topic, or answering simple poll questions.
- **Competence.** Structure your virtual event for participants to experience progression and growth, easing participants into new skills or content, so they can build confidence and expand their understanding as the event moves forward. If it involves using a new skill, demonstrate first, then ask participants to try; if there's new content, start with basics, check for understanding, then build on the concept.
- **Relatedness.** Provide opportunities for participants to connect personally and build relationships with other attendees, so they feel valued and invested in the event. Do this through virtual ice-breakers, personal chat-box prompts and breakout-group discussions.

As often as possible, engage individuals' physical bodies in the virtual space, such as guided stretch breaks and physical polling – even if you can't see other attendees (for example, "raise your left hand if...").

Consider how long you can reasonably expect people to stay in one place, and remain attentive.

- A typical work day is 8 hours, which includes multiple breaks, changes in tasks, and often changes in venue. A typical public-engagement event (even a full-day one) is usually less than 8 hours and more like 6 hours. The same is true of the standard school day. The average meeting is 60 minutes. Our experience suggests that

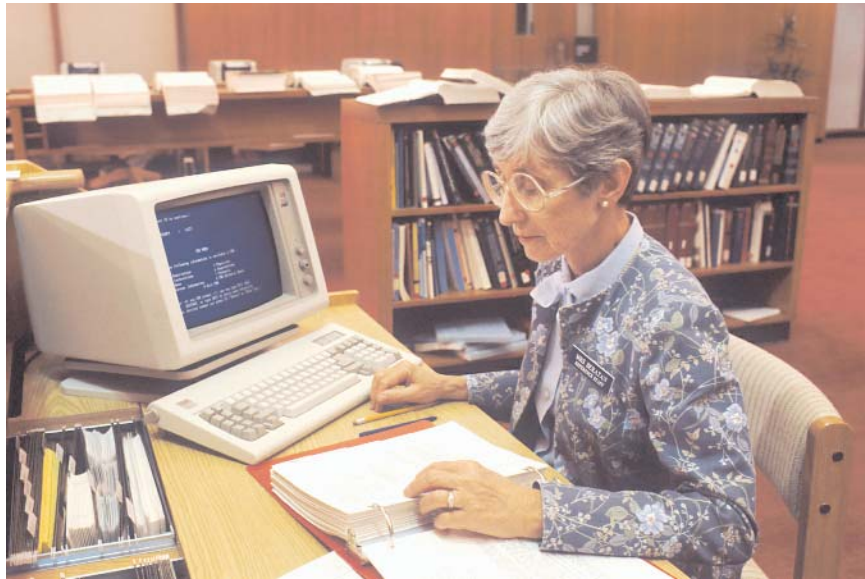


4-5 hours is the maximum length for virtual engagement, assuming there's a thoughtful blend of content and format. Any longer, and the experience will be diminished for most participants.

- Neuroscience and educational research suggest our attention spans are far shorter.² Experts recommend structuring content-delivery in 20-minute segments. Every 20 minutes, there should be a shift or transition of some kind (such as an expert speaker for 20 minutes, followed by 15-30 minutes of Q&A/discussion; a 20-minute lecture, followed by a group exercise; 20-minute blocks per agenda item).³
- Structure your event timeline and agenda accordingly.

Acknowledge both the limitations and benefits of the virtual environment to your participants (without assuming that virtual is automatically "less-than" in person):

- Encourage participants to be kind to themselves (meet their own physical and mental needs) while also being thoughtful toward the organizers and other attendees (be as attentive and engaged as possible; have patience and grace for others).
- Highlight the multiple methods available for engagement – the various tools and techniques you will be using during the event.



2 The Outcome Is More Important than the Deliverable

This requires thinking critically about the participant experience, then structuring the event and your content accordingly.

Rather than thinking in terms of metrics (how many attendees, how many hours of content or instructional minutes, how many public comments), consider what you want participants to get out of the experience. **What should they walk away thinking, feeling, knowing and doing?**

3 Purpose of the Engagement

Your purpose for engaging your audience will have a major influence on the type of virtual engagement event you organize, the way you structure that engagement, and the tools you choose.

Before determining how to engage, decide whether you even need to engage. One simple question to determine whether or not to have a virtual engagement event is: “Will the world be better if we have the meeting?”

More specifically, will the community, sector, profession or target audience be better off – in whatever way – if we have the virtual gathering?

Identify why you are engaging. What do you want to get out of the engagement, and what others will get out of the event? What outcome will result from the event – will you:

- Make a decision?
- Improve understanding?
- Fix a problem?
- Advance the field?
- Build community?

Clearly articulate what the specific result will be if the engagement is successful.

4 Capacity of the Target Audience

Assess Resources and Limitations

Can you assume your intended participants will have adequate internet service/broadband access for online meetings, a home computer, a quiet space to participate, a phone to call in on, a headset or headphones for better sound quality, access to a printer to print materials shared in advance (if necessary, and especially for phone-only participants or those with limited access to devices or broadband)?

The resources generally available to your target audience will influence how you structure your event or engagement. Don’t expect more from your attendees than they can reasonably provide.

Think through how you can make accommodations for participants with limited resources or other obstacles:

- Email the agenda, slides and other materials in advance for those with poor bandwidth, who may only be able to call in.
- Consider mailing hard copies of materials to those without a computer or printer at home (upon request).
- Acknowledge that some participants may be in a shared space, and have family members/pets present, possibly interrupting, and other ambient noises (like leaf blowers, traffic, loud neighbors). That's okay, no need for embarrassment.
- Acknowledge that not all attendees will be able to participate the entire time. That's okay too.

Plan for Varied Modalities

Make space and provide engagement opportunities for all learning modalities (auditory, visual, kinesthetic).

Hold space for silence. Allow time for mental processing before calling for responses, or provide a shared space for participants to respond in their own time (chat box, white board, shared document).

Keep accessibility features in mind, such as closed-captions for hearing-impaired individuals, dictation for physically impaired individuals and audio descriptions for visually impaired persons.



5 Functionality of Platforms, Programs and Apps

Common platforms or tools for virtual engagement include webinars, video-conferencing, live chat, live polling, virtual breakout groups, virtual white boards and collaborative online workspaces (such as Microsoft Teams and Google Drive). Every tool has the potential to add functionality to your virtual engagement, but also adds a layer of complexity. Consider carefully which tools and applications are appropriate for your intended purpose – and whether they are accessible to your target audience.

Some programs work better on Mac vs. PC. Choose one that works for your team, and will also work well for a wide range of attendees.

Be mindful that participants using mobile devices will have a different view from that of a computer:

- There may be some differences in display from Mac to PC to Android. This is important to your preparations: Create a guiding document on how to prepare for the meeting, use the technology, and trouble-shoot user issues.
- Do free versions provide all the functionality you need for your particular purpose? Do paid features add the necessary functionality to warrant the cost? If you have a paid version, can your non-paid participants access those features?

Do the various programs, apps and platforms you intend to use integrate well with each other?

Be sure to test ALL programs extensively in advance of your event.

- Test them individually, and in conjunction with one another (if using multiple tools and programs).
- Test with multiple users of different types of phones (landline and mobile; Apple and Android) and computers (desktop and laptop; Mac and PC).

Specific Guidance

on how to get the most out of virtual outreach and interactions

1 Purpose of the Engagement

The purpose for which you are engaging your audience will have a major influence on the type of engagement event you organize, the way you structure the engagement, and the tools you choose. Consider *why* you are engaging in the first place: **What do you hope to get out of the engagement, and what do you want others to get out of it?**

You may determine that you don't actually need a meeting. Before determining how to engage, decide whether you even *need* to engage. Below is a simple checklist for deciding whether to engage:



The best engagement occurs when participants are in the position of decision-maker, and have an opportunity to consider tradeoffs. Yet, during a crisis (such as COVID-19), the public often experiences “micro-decision overload” – too many decisions in too short a time.

Be sure to structure your engagement in such a way that provides autonomy for your audience, without overwhelming them with too many choices or decisions. Consider ways to simplify what you want or need input on, so that you can actually grab and hold your audience's attention.

Questions to Help You Determine When to Proceed with Engagement

Answer “YES” to **at least one** of the following questions:


- Is it urgent?
- Is it important?
- Is it fair?
- Is it simple (or can it be simplified)?

Answer “NO” to **all** of the following questions:

- Is it tone-deaf?
- Is it esoteric?
- Is it unfair?
- Is it excessively complicated or complex?

A number of different **reasons to engage and types of formats for engagement events** are listed below, in order from least to greatest need for interaction.

Spectrum of Public Participation



	Inform	Consult	Involve	Collaborate	Empower
Public Participation Goal	To provide the public balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision, including the development of alternatives and the identification of the preferred solution.	To place final decision-making in the hands of the public.
Promise to the Public	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.
Example Techniques	<ul style="list-style-type: none"> • Factsheets • Web sites • Open houses 	<ul style="list-style-type: none"> • Public comment • Focus groups • Surveys • Public meetings 	<ul style="list-style-type: none"> • Workshops • Deliberative polling 	<ul style="list-style-type: none"> • Citizen advisory committees • Consensus-building • Participatory decision-making 	<ul style="list-style-type: none"> • Citizen juries • Ballots • Delegated decision

source: International Association for Public Participation, iap2.org.au

Sharing Information

When information-sharing, clarifying questions may be asked or responded to, but no decisions are made or actions are taken.

➤ **One-way:** Public service announcement, update, reporting on results. One or more parties provide content from a place of authority or expertise, speaking to a broader audience. Any media type is reasonable, including print, online, email, newsletter, audio-recording or video-recording.

No live engagement is necessary, unless there is a need or desire for real-time clarification.

➤ **Two-way:** Coalition, network or partner updates. Both (or all) speak from equal authority or expertise; speaking to each other, without a broader audience present. A standard audio- or video-call is sufficient. This type of engagement could also be accomplished via email or other media information transfer.

Soliciting Input

Similar to two-way information-sharing, yet with a different purpose, the organizer will provide some background information and context-setting, then seek feedback from participants. The intent is for the organizer to collect and compile comments from the audience, so no dialogue or interaction between participants is necessary.

Many formats can be used for soliciting input in a virtual setting, both static or real-time. These activities include email blasts, online polling, automated phone polling, surveys by mail and recorded video with multiple-response options (such as chat/comment box, recorded phone line, email or print mail).

If the organizer wants real-time feedback, a standard webinar format – in which the organizer presents and the audience then has the opportunity to respond (via text chat or audio-response) – is sufficient.



Encouraging Dialogue

Parties discuss or debate a particular topic, seeking to better understand it or reach agreement. This interaction can be conducted via a standard audio- or video-call, with discussion points, agenda and other materials shared in advance. Other capabilities can add to the richness of the dialogue, but are not necessary.

Fostering Collaboration

Parties work together toward accomplishing a common goal, developing a shared product or achieving a desired outcome. Virtual collaboration requires a shared virtual workspace equally accessible to all participants, and clear understanding by everybody of how to use the selected tools. Examples include a Zoom or GoToMeeting video-call with Google Docs or DropBox live edit and/or a virtual whiteboard.

The more complicated the goal is, the more complex are the collaboration tools required.



Training for Rewarding Engagement

When teaching an audience new skills, content or competencies with the intent of content mastery and implementation, you want the audience to learn something new and then put it into practice.

Virtual training (whether skills- or content-based) requires the highest degree of interaction between presenters and participants, as well as participants with one another. A simple video module or webinar structure is not sufficient. Virtual platforms and tools must allow for participants to interact with one another and collectively contribute in a shared virtual environment (virtual white board, Google Docs, Quiziz, PollAnywhere).

Content Training. Deliver the content in an engaging way, with multiple opportunities for the audience to test their understanding and put their new knowledge into practice (such as understanding your regional watershed, community-design principles or climate-change impacts).

Skills Training. Demonstrate the skill(s) you want participants to acquire, providing multiple opportunities for them to practice the new skill(s) with one another through virtual simulations (such as problem-solving through virtual scenarios, developing an action plan, or analyzing a policy).

2 Identifying the Target Audience

One of the most important steps in preparing any engagement effort or event – whether in-person or virtual – is determining the intended audience. **Your target audience will shape your content as well as your delivery method, platform and virtual-engagement tools.**

Tailor the content and delivery method to the capacity of your audience, including their level of background knowledge, technical capabilities, attention span, interest in the subject, resources available and potential familiarity with the event platform.

It may be challenging to identify your target audience, especially if you intend to engage “the general public.” Narrowing down the scope of your audience to the most specific subset possible will help ensure your event achieves its intended outcomes.

If you’re having a hard time determining your audience, you can start by identifying who is *not* your audience, and increase in specificity from that point.

Example target audiences might include impacted groundwater users in a particular basin, climate collaborative members, safe-routes-to-school advocates and energy-utility investors.

3 Selecting the Type of Event

To help determine what type of engagement event you're organizing, consider these three characteristics:

Inclusivity. Is it open to everyone, by invitation to various different levels of expertise, or limited to only certain senior leaders in the sector?

Format. Does the format include presentations, discussions or a hybrid?

Content. Are the issues and discussion topics more academic, research-oriented, technical or professional?

4 Developing a Virtual Event

Once you have identified the type of event that is appropriate for your audience and desired outcomes, you can begin planning the event's structure and content. Be sure to think critically about your event implementation when developing the content.

Outlined below is more specific guidance on planning your virtual event delivery, which will help you better prepare for the virtual environment.

Delivery and Implementation Details

Consider your audience's location when scheduling:

- If you're likely to have participants from multiple time zones, be mindful of setting start and end times during regular business hours (or appropriate after-work hours for community engagement that you might set for in-person events) for each time zone.
- Indicate the primary (and secondary) time zone of your event in all event notifications (such as 1:00 pm PDT / 4:00 pm EST).

What's the Best Type of Virtual Event for You?

To select the best type of engagement event for your situation, consider the most appropriate format and mechanism(s) for achieving your objectives.

❑ **MEETING:** An occasion when people come to gather to discuss or decide something. Virtual meetings can be a basic conference call or video conference, with a simple agenda.

❑ **FORUM:** An assembly for discussion, with opportunities for all participants to share information. Virtual forums require a more carefully structured agenda, and likely the use of breakout groups.

❑ **SUMMIT:** An official meeting or series of meetings between key officials, decision-makers and/or leaders in their field to discuss important issues, policy decisions and aspirational goals.

A virtual summit will likely be invite-only, include video-conferencing, and have a structured (rather than free-form) discussion format.

❑ **SYMPOSIUM:** A formal meeting of specialists, delivering short addresses on a topic or on related topics. The emphasis is on knowledge-sharing and increasing understanding, rather than dialogue or decision-making.

A traditional webinar structure, in which only the presenters are on video but attendees have the opportunity to ask questions (via chat or verbally), is appropriate.

❑ **CONFERENCE:** A large official meeting, usually over multiple days, at which people with shared work or interests come together to learn from one another and discuss their views. This is the most difficult type of event to replicate in a virtual setting, because of the wide audience and broad subject matter covered.

Some combination of video-conferencing, including large and small breakout groups, with a series of presentations or webinars over an extended time frame, is the closest approximation to an in-person event. Including breaks and interactive activities is especially important for virtual conferences.

❑ **WORKSHOP:** A brief (1/2-2 day) intensive educational program for a relatively small group of people that focuses especially on techniques and skills in a particular field.

Small-group discussions and interactive activities in which participants can practice the skills they are learning are critical for virtual workshops. A robust video-conferencing platform paired with other interactive apps is the best fit.

❑ **TRAINING:** A very brief (1-3 hours) course to assist in learning new skills needed to complete a job or task. More narrow in scope than a workshop, a virtual training can be conducted via a traditional webinar format, or with greater participant interaction via video-conferencing with additional applications.

Provide basic information and resources in advance:

- Agenda (including allotted time for sections).
- Contact information for event organizer.
- All technical information necessary, including a guide for how to join the event and additional support for new platform users.

Delivery Method:

- Offer webinar-style expert presentations only?
- Add breakout groups for more in-depth discussion or collaboration?

Practice the Event Logistics

Walk through your entire agenda, testing every activity and feature with your team. Make adjustments to improve flow as needed.

Pay close attention to the instructions that you'll need to provide to attendees in real time.

Early Tech-Check and Start-up

Log on and open your event at minimum 20 minutes prior to the start-time. This allows participants time to log in and trouble-shoot as needed.

It will also create a more relaxed and fluid start-up than if everyone tried to log in at the same time, and you had to trouble-shoot with all of the attendees immediately – which would inevitably put the event behind schedule.

Facilitating the Event Experience

- Lead by example. Model the behaviors you want participants to exercise:

Helpful Tips for Organizing Virtual Breakouts

- Limit the breakout groups to no more than 8 people per group, including group facilitator and note-taker. Any more, and there's not enough time/space for everyone to engage actively.
- Schedule a minimum of 15-20 minutes per breakout-group discussion. It takes time to transition into virtual rooms, for the facilitator to provide an introduction and overview, for participants to introduce themselves, and to then dive into conversation.
- Usually 15 minutes is only enough time to discuss one question or point. The more complex the topic, the more time you'll need in breakout groups.
- Breakout-group discussions should be 45 minutes maximum. Any longer, and it just feels too long; and participants won't use/manage time wisely.

- ◆ Prepare your visible workspace to prevent background distractions (clean, neat, professional, uncluttered, well-lit). The same aesthetics go for smart-phone backgrounds.
- ◆ Dress and groom professionally.
- ◆ Keep video on.
- ◆ Look directly into the camera. (Avoid distracting movements.)
- ◆ Mute when not speaking.

- Embrace humanity and encourage humor.
- Hold space for patient silence. Allow participants and presenters time to think and process before responding – don't jump in too soon to fill the gap.

- Be mindful and attuned to the needs of all participants:
 - ❖ Treat all participants equally, regardless of how they engage (phone, video, text). Provide equal opportunities to engage, don't bias attention toward one over others.
 - ❖ Periodically check in with phone-only participants. Remind them what other participants are viewing on their screens, where you are on the agenda, and so forth.
 - ❖ Provide space during every discussion session for phone-only participants to speak (at the beginning and the end, and between video-participant comments).
- Regularly check the chat and/or questions box and/or the raise-hand feature:
 - ❖ Provide regular updates to all attendees and individual participants using these features.
 - ❖ Acknowledge questions/comments submitted via chat – either directly via the chat/question box and/or verbally to all attendees.
 - ❖ If using video, pay close attention to the facial expressions and body posture of attendees to gauge their interest, understanding and energy levels.
- Provide regular check-ins and updates about agenda, schedule and event adjustments.

RECOMMENDED FLOW:

- Welcome everyone and thank them for their participation and devoting their time to the event.
- Introduce yourself as lead facilitator, and any other event staff – briefly describe their roles.
- Provide a brief overview of technical features and engagement options. Be sure to include whether folks will be muted by event staff, or self-managed. Ask others to mute when not



talking, and turn off video when they have to attend to other things – so as not to distract others.

- At the close of the event, unmute all participants so they can verbally say goodbye /thank-you to one another.

End notes

- 1 Gazzaley, Adam and Larry Rosen. (2016). *The Distracted Mind: Ancient Brains in a High-Tech World*. MIT Press.
- 2 Niemiec, CP, & Ryan, RM. (2009). *Autonomy, competence, and relatedness in the classroom: Applying self-determination theory to educational practice*. *Theory and Research in Education*.
- 3 Queen, J.A. (2002). *Block scheduling revisited*. *Phi Delta Kappan*.



The Local Government Commission expresses our gratitude to the Water Foundation for supporting this work.

Tools and Resources

Broadening Public Participation Using Online Engagement Tools (Institute for Local Government)

<https://drive.google.com/open?id=13LrYqcGuFSCS9MBvf8-xtel8Qtb23HhL>

Virtual Meetings for Clarity and Momentum (CoCreative.™)

<https://cocreative.app.box.com/s/5xphy3jktai74ut2d7nh0g842lh1jvvb>

Online Meeting Resources Toolkit for Facilitators

https://docs.google.com/document/d/1NyrEU7n6IU5rgGiflx_dK8CrdoB2bwyyI9XG-H7iw8/preview

(Facilitators for Pandemic Response Group)

<https://groups.io/g/f4c-response>

Zoom tutorials for phone & computer; English & Español (UC Merced)

<https://ucmerced.app.box.com/s/24hroqt5xs99t58m7fzue49ypueyybzd>

Participation Tools for Better Community Planning

(Local Government Commission)

<https://www.lgc.org/resource/participation-tools-community-planning>

Interested in virtual events to connect local leaders, advance policy, or provide technical assistance on climate change, community design, energy or water?

Reach out:

Danielle Dolan
ddolan@lgc.org | 916-448-1198 x 311
lgc.org/resources

